EVALUATION PROCESS: STEPS

INSTRUCTIONS: Evaluation is a process of inquiry that facilitates learning by asking critical questions to help inform decision-making. The challenge is that the models used to evaluate organizations don't always address the dynamic and complex nature of collaborations. The following steps and suggestions will help your collaboration to effectively evaluate the collaboration processes and relationships and its achievements.

1. Identify what needs to be evaluated, why and for whom and how it will get done.

- What are we evaluating (e.g., the feasibility of the collaboration, the structure and processes of the collaboration and/or its outcomes and impacts)?

- If we are looking to evaluate outcomes and impacts, have we clearly articulated them and if not, how will that be done?

- Why are we evaluating (e.g., to satisfy accountability demands; improve our work and results; verify our value; generate participation or support)?

- What type of evaluation are we doing (e.g., collecting information to be used to fine-tune or adjust strategies in a continuous feedback cycle or to inform a more formal planning cycle)?

- Who needs the information and how will they use it (e.g., members of the collaboration, partner organizations Boards or staff, funders, clients/stakeholders)?

- Who will conduct the evaluation, what resources are required and how will the work plan be developed?

2. Design the evaluation framework and methodology.
   Consider the following questions to help frame it:

- What approach will we use (e.g., surveys, mapping, focus groups, document analysis, testimonials, story-telling)? It will be important to use diverse approaches to address the complex and dynamic nature of collaborations.

- Do you want a snapshot in time, to capture things as they unfold and/or to look at past performance?

- Will the evaluation be done routinely, periodically or in longer intervals?

- Whose views need to be heard to ensure that there is the right diversity and credibility of responses to capture a true picture?

- How can we capture unexpected outcomes as part of the evaluation? Remember that collaboration can lead to synergies and outcomes that could not be predicted at the outset.

- What questions need to be asked to solicit the right information?

- What sources of information will be used and how credible are they?

- Is there baseline information we can use to make comparisons?

- Who will collect the information and how can it be done with the least amount of bias?

- Who needs to review the evaluation findings (e.g., partners, partner organizations, respondents, funders, key stakeholders)?

- How can the findings be presented in a way that allows for the best observations and learning (e.g., show consolidated information or the diversity of perspectives; use tables or vignettes)

- How can we ensure we are capturing different interpretations (e.g., what lens is being used; are we challenging our assumptions)?

---

3. Determine the actions that need to be taken to respond to what was learned. Consider:

- How will we make changes, adaptation or refinements based on what we have learned?

- How can we use the information to gain support for our initiative?

United Way
Toronto